# UI BUILDER™ FOR ACCESS – BUSINESS EDITION VERSION 5

## Application Guide

Version 8.8.15

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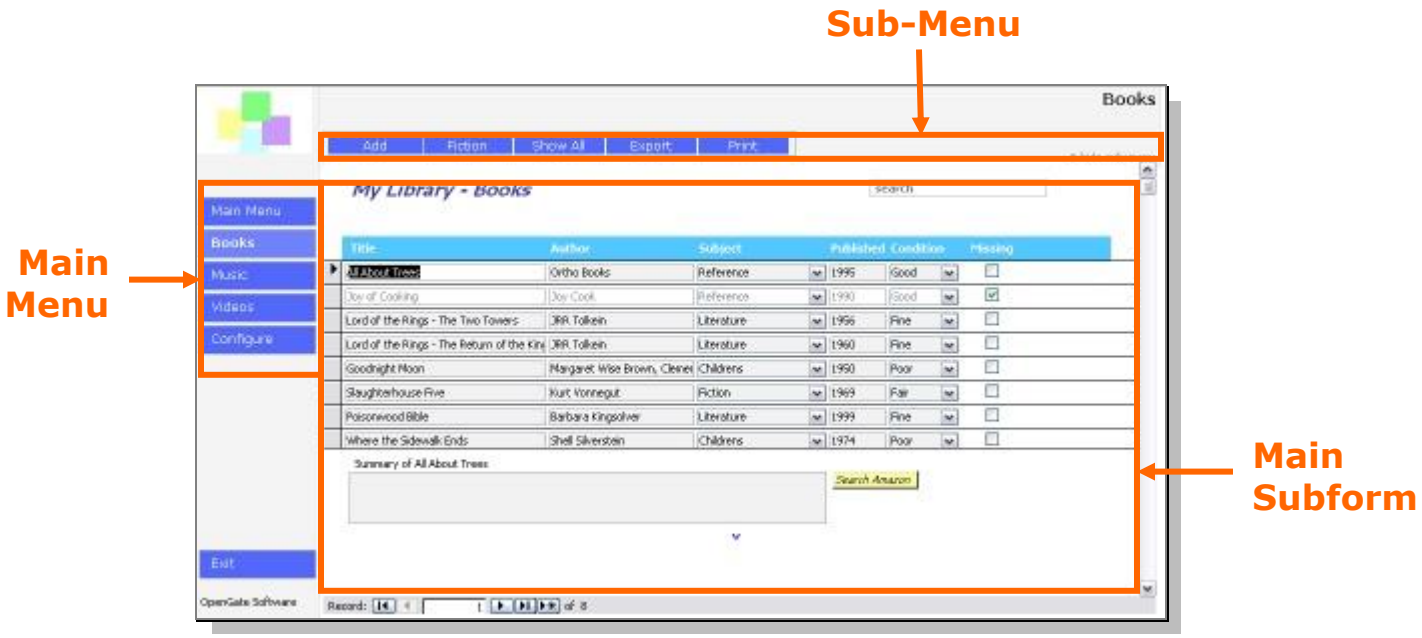
# 1 General Concepts and Resources

This section describes the general concepts used in this document and when working with the UI Builder™ application.

## *1.1 USER INTERFACE*




As shown above, the Main Menu, at left, is a set of up to five menu buttons displayed to a user at all times. The Sub-Menu, shown at the top, is a set of up to five sub-menu buttons that can be shown or hidden by the user, and are configurable for each selected Main Menu button. For example, you may decide to have no sub-menu buttons for the "Music" Main Menu option, two sub-menu buttons for the "Videos" Main Menu option, and five sub-menu buttons for the "Books" Main Menu option. Buttons can be configured to perform distinct actions that you specify. Finally, the Main Subform, shown at the center of the screen above, is where you display your application forms to the user.

## *1.2 RESOURCES*

In addition to this document, you will be able to access help information from the Administrator and Sub-Menu Administrator forms by pressing F3 when you place the mouse cursor in a specific field. Additionally, there is an online demonstration available at:
http://www.opengatesw.net

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# 2 Migrating Your Application

## 2.1 MIGRATION OPTIONS

If you are integrating your own application into the UI Builder framework, you have two methods to chose from:

1. Import your database application forms, queries, tables, macros, and code modules into the UI Builder database file.
2. Import the UI Builder database file forms, queries, tables, macros, and code modules.

Method (1) above is best suited for situations where your database application does not have references to ActiveX or other dynamic link libraries (DLLs) beyond the Microsoft® Access™ default references. If you are unsure about whether this is true for your application or not, it is recommended you use method (1). Method (2) is generally easier if you have many references to ActiveX or other dynamic link libraries (DLLs) beyond the Microsoft Access default references, or if you are unfamiliar with how to import forms, queries, tables, macros, and code modules into a database.

## 2.2 MIGRATION STEPS

### 2.2.1 IMPORTING YOUR FORMS, QUERIES, TABLES, MACROS, AND CODE MODULES

To import your forms, queries, tables, macros, and code modules into the UI Builder file, follow these steps:

1. Create a copy of the UI Builder database file so that you can create other database applications using UI Builder in the future. You can then rename one of the copies to the name of your database application to begin importing your forms, queries, tables, macros, and code modules into the UI Builder framework.
2. Select "Migrate an Application" from the opening menu screen.
3. In the dialog that follows, please read the notification and select "Next."
4. In the Import Objects dialog, select all forms, queries, tables, macros, and code modules you want to migrate.
5. If you have an relationships or import/export specifications, be sure to select "Options>>" at the bottom right of the Import Objects dialog and select the corresponding checkboxes.
6. Select **OK**.
7. You are now ready to proceed to the next step in Section 2.3.

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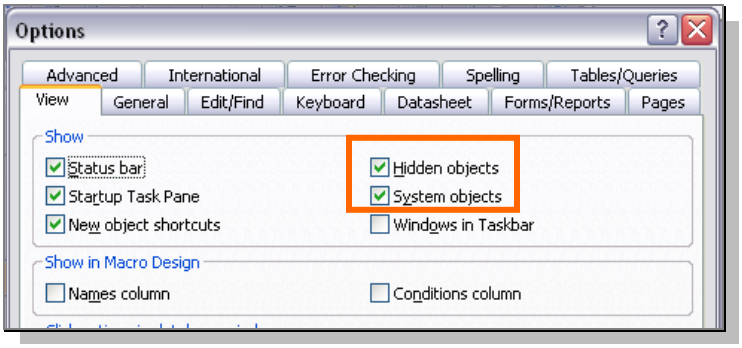
### 2.2.2 Importing UI Builder Into your Database

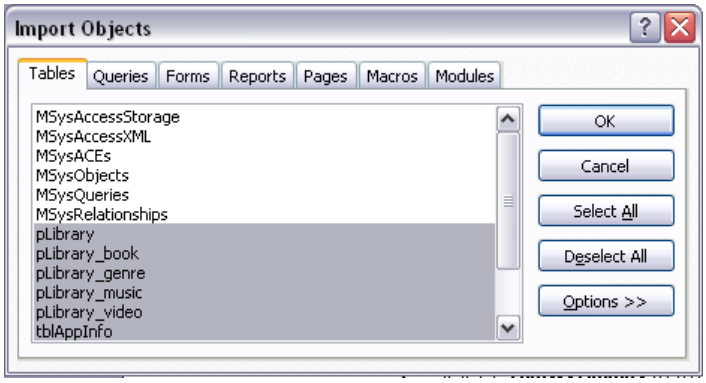
#### 2.2.2.1 Access 2000 and Access 2003 Users

To import UI Builder forms, queries, tables, macros, and code modules into your existing database file, follow these steps:

1. We recommend you first backup your current application. You can backup your database when it is open by selecting **File>>Backup**, or by copying and pasting your database file in Windows Explorer.
2. Select **Tools>>Options** from the File menu.
3. In the Options dialog, select the View tab.
4. At the top right, make certain the "Hidden objects" and "System objects" check boxes are checked as shown below.




5. Select **OK**.
6. Select **File>>Get External Data>>Import…** from the File menu.
7. Select the UI Builder file you have downloaded or received in the File Open dialog.
8. In the Import Objects dialog, as shown below, select all tables except in the Tables tab except those that begin with "Msys"




9. Select each remaining tab, and for each, click on the "Select All" button.
10. Click **OK**.

> **Important!**
> Any objects with the same name will be imported as "Name1." That is, Access will append a number to the end of the duplicate-named object.

11. Press **Ctrl+G** on your keyboard to open the Visual Basic Editor.
12. Select **Tools>>References** from the menu.

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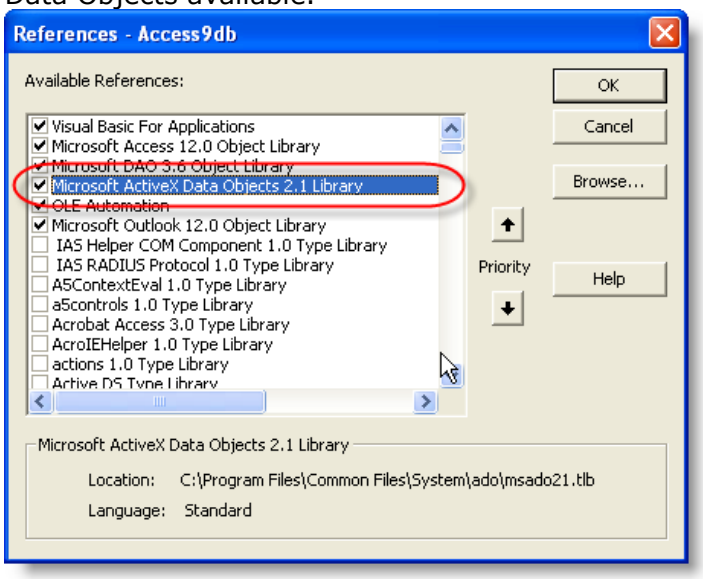
13. In the dialog, make sure you have an item with the name "Microsoft ActiveX Data Objects 2.x" checked. If you do not, scroll through the list and check the box next to the highest 2.x version of Microsoft ActiveX Data Objects available.

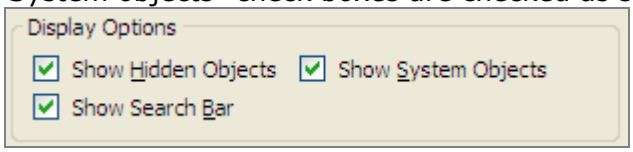



14. Click **OK**.
15. Click the Save icon in the toolbar.
16. Close the Visual Basic Editor Window.
17. You are now ready to proceed to the next step in Section 2.3.

### 2.2.2.2 Access 2007 Users

To import UI Builder forms, queries, tables, macros, and code modules into your existing database file, follow these steps:

1. We recommend you first backup your current application. You can backup your database when it is open by selecting the Office icon , then **Manage>>Back Up Database** or by copying and pasting your database file in Windows Explorer.
2. Select the Office icon , then **Access Options>>Current Database>>Navigation Options**...
3. In the Display Options box, make certain the "Show Hidden objects" and "Show System objects" check boxes are checked as shown below.




4. Select **External Data>>Access** from the Ribbon menu.
5. Select the UI Builder file you have downloaded or received in the File Open dialog.
6. In the Import Objects dialog select all tables except in the Tables tab except those that begin with "Msys." You can also exclude the sample tables: **pCustomer, pOrder, pCustomer_audit, pOrder_audit, pContact**

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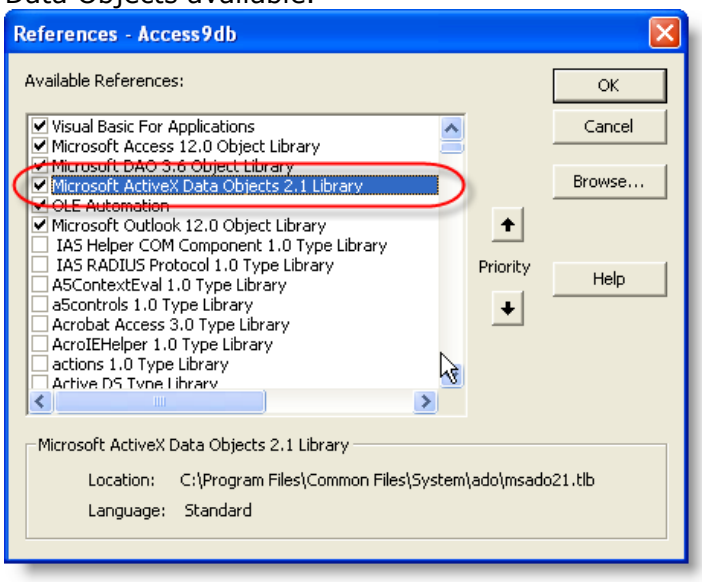
7. Select each remaining tab, and for each, click on the "Select All" button.

> **Important!**
> Any objects with the same name will be imported as "Name1." That is, Access will append a number to the end of the duplicate-named object.

8. Click **OK**.
9. Press **Ctrl+G** on your keyboard to open the Visual Basic Editor.
10. Select **Tools>>References** from the menu.
11. In the dialog, make sure you have an item with the name "Microsoft ActiveX Data Objects 2.x" checked. If you do not, scroll through the list and check the box next to the highest 2.x version of Microsoft ActiveX Data Objects available.




12. Click **OK**.
13. Click the Save icon in the toolbar.
14. Close the Visual Basic Editor Window.

## 2.3 VALIDATE OBJECTS

Once you have migrated your forms, queries, tables, macros, and code modules, we recommend you validate that everything is functioning as expected before you begin to integrate your application with UI Builder. To do so, simply perform the usual tasks you would normally do using your database application. This will ensure any integration issues are easily identified. If you application does not appear to be functioning as expected after migrating objects, ensure you imported all the objects you need, including any table relationships, Visual Basic for Applications (VBA) references, and import/export specifications. If you have VBA in your own database application, we recommend you compile the project to ensure there are no duplicate function names between your application and the UI Builder VBA.

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## 2.4 OBJECT COMPATABILITY

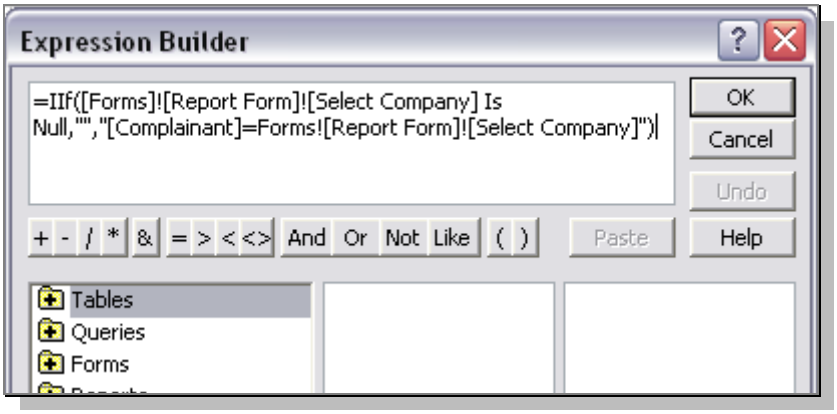
In most cases, you will not need to make significant changes to your forms, queries, tables, macros, and code modules. The largest change will be to resize your forms to take on the appearance you want within the UI Builder Main Subform.

### 2.4.1 FORM REFERENCES

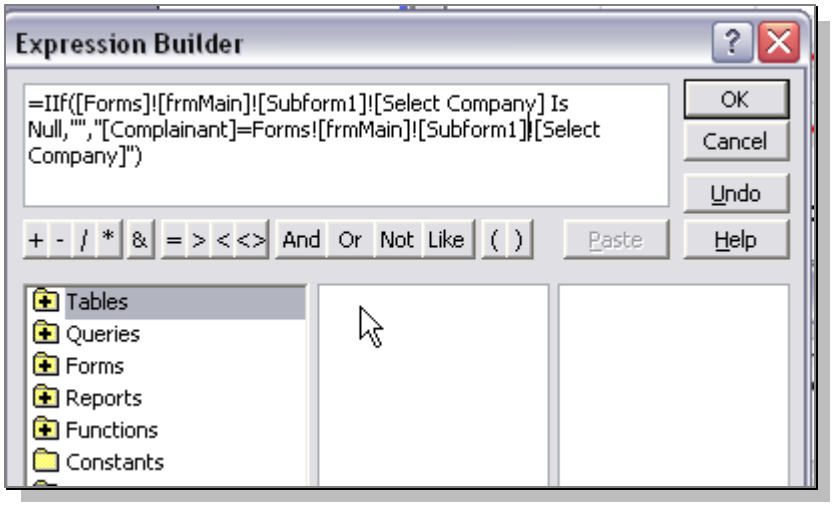
If you know your existing application has references to your forms, and you want those forms to appear in the subform of the main menu, you may need to reconfigure how the forms are referred to.

**Example 1**

You have subform fields or macros that refer to the parent form as follows:




You will need to change them to refer to the main form's (frmMain) subform (Subform1) as follows:




Note that "[Report Form]" in the original expression has been replaced by "[**frmMain**]![Subform]" as shown above. This is because your form (and any subforms within that form) become

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a subform to the UI Builder's main window. You will need to replace **frmMain** as shown above with the name of the **frmMain** layout you choose to use, as shown in the table below:

| Layout | Main Form Name |
|---|---|
| Left buttons, 1024x768 | frmMain_left |
| Right buttons, 1024x768 | frmMain_right |
| Top buttons, 1024x768 | frmMain_top |
| Left buttons, 1028x 1024 | frmMain_leftlg |
| Right buttons, 1028x 1024 | frmMain_rightlg |
| Top buttons, 1028x 1024 | frmMain_toplg |
| Resizing menu, 1028x 1024 | frmMain_expandlg |

**Example 2**
You have VBA code that refers to one of your forms as follows:

Forms!**MyFormName**.Form.FilterOn = False

*Or*

[Forms]![**MyFormName**].Form.FilterOn = False

In this case, you simply need to make the following change:

Forms(gobjMain.Name)!Subform1.Form.FilterOn = False

## 2.5 CONFIGURING MENUS

### 2.5.1 CONFIGURING THE MAIN MENU

UI Builder – Business Edition supports eight Main Menu items. Each Main Menu item can be configured to display a label you specify, and carry out an action you define. To configure the application, open the frmAdministrator, or select "Configure" from the Main Menu (if you have not already replaced the Configure menu option with one of your own).

As shown in the screen image below, there are five Main Menu options, each with corresponding Menu Button Text, Button Action, and Action Details fields.

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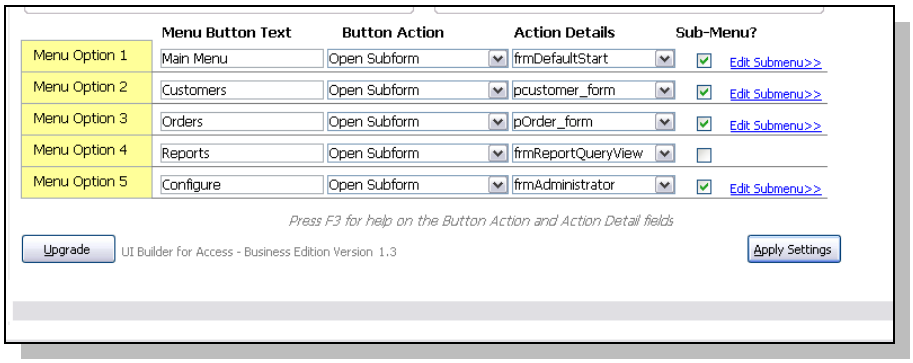


If you do not want a specific Main Menu button to display to the user, simply clear the text from the Menu Button Text field for that button. For assistance with how to complete the Button Action and Action Details fields, press F3 on any specific field to display the help for that action.

### 2.5.1.1 Menu Actions

| Button Action | Description | Action Detail Options |
|---|---|---|
| **Create Email** | Create a new email message in draft mode. | Optionally, specify the email address to default into the email. |
| **Mail Merge (Business and Enterprise editions only)** | Executes a pre-defined Mail Merge profile selected in the Action Details field. | Choose the Mail Merge profile you want to run. |
| **Open Dialog Box** | Displays a dialog box with the text you supply in the Action Details field. | Provide the message text you want to display to the user. |
| **Open File** | Opens a file specified in the Action Details field. | Provide the file name you want to open. Select "Browse..." to locate the file. |
| **Open Form (Dialog mode)** | Open a form in a new window in dialog mode (does not allow the user to navigate to any other part of the screen unless they close your form). | Select the name of a form in your database. |
| **Open Form (New Window)** | Open a form in a new window. | Select the name of a form in your database. |
| **Open Report** | Open a report in print mode. Note that the report will print automatically. | Select the name of a report in your database. |
| **Open Report (preview)** | Open a report in preview mode. | Select the name of a report in your database. |
| **Open Subform** | Open a form within the UI Builder menu screen. | Select the name of a form in your database. |
| **Open Subform (add only)** | Open a form within the UI Builder menu screen in Add-only mode. This means the user will not be able to see existing records in the table, only add new records. | Select the name of a form in your database. Refer to the "**Error! Reference source not found.**" section for options on filtering records when the button is clicked by the user. |
| **Open Subform (read-** | Open a form within the UI Builder | Select the name of a form in |

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| | | |
|---|---|---|
| **only)** | menu screen in read-only mode. This means the user will not be able to edit the records displayed. | your database. Refer to the "**Error! Reference source not found.**" section for options on filtering records when the button is clicked by the user. |
| **Open URL** | Opens a web URL specified in the Action Details field. | Provide the URL, beginning with HTTP:// |
| **Run Code** | Runs a VB function that you enter into the Action Details field. Note that Subroutines cannot be run with this option. | Pass any desired parameters to the Function in the Action Detail field, e.g.: fMyCode("parameter") |
| **Run Code (delivered)** | No longer used. | No longer used. |
| **Run Macro** | Executes a macro that you specify in the Action Details dropdown. | Select the name of a macro in your database. |

### *2.5.2 CONFIGURING SUB-MENUS*

Each Main Menu button can have it's own Sub-Menu. To activate a Sub-Menu, simply check the "Sub-Menu?" checkbox in the Administrator form. Select "Edit Submenu>>" to edit the Sub-Menu for that particular Main Menu item.

There are over 18 different actions you can perform for each Sub-Menu button. For assistance with how to complete the Button Action and Action Details fields, press F3 on any specific field to display the help for that action. Finally, similar to the Main Menu buttons, if you do not want a specific Sub-Menu button to display to the user, simply clear the text from the Menu Button Text field for that button.

#### 2.5.2.1 Sub-Menu Actions

| Button Action | Description | Action Detail Options |
|---|---|---|
| Add Record | Add a new record to the current form. | None. |
| Clear Subform Filter | Clear a filter on the current form. This action is usually used after the Filter Subform action (below) is used. | Specify the form record source you want to use. For example: "Select * from tblProjects" will select all records from tblProjects. |
| **Copy Record** | Copy the current record to a new record. | None. |
| **Create Email** | Create a new email message in draft mode. | Optionally, specify the email address to default into the email. |
| **Create Outlook Task (Business and Enterprise editions only)** | Create a new Microsoft Outlook task by prompting the user for the task details. | None. |
| Delete Record | Delete the currently selected record. The user will be prompted to confirm the action first. | None. |

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| Button Action | Description | Action Detail Options |
|---|---|---|
| Delete Record (no confirm) | Delete the currently selected record without prompting the user to confirm. | None. |
| Export to CSV | Exports a table/query to comma-separated value file (CSV). The user will be prompted to provide the filename for the exported file. | Select the table or query to export. |
| Export to Excel | Exports a table/query to Excel-compatible file. The user will be prompted to provide the filename for the exported file. | Select the table or query to export. |
| Filter Subform | Filter the currently displayed form. | Specify the form record source you want to use. For example: "Select * from tblProjects WHERE [Project-Status] <> 'Cancelled'" will select all records from tblProjects where the Project-Status field is not equal to Cancelled. |
| **Mail Merge (Business and Enterprise editions only)** | Executes a pre-defined Mail Merge profile selected in the Action Details field. | Choose the Mail Merge profile you want to run. |
| **Open Dialog Box** | Displays a dialog box with the text you supply in the Action Details field. | Provide the message text you want to display to the user. |
| **Open File** | Opens a file specified in the Action Details field. | Provide the file name you want to open. Select "Browse..." to locate the file. |
| **Open Form (Dialog mode)** | Open a form in a new window in dialog mode (does not allow the user to navigate to any other part of the screen unless they close your form). | Select the name of a form in your database. |
| **Open Form (New Window)** | Open a form in a new window. | Select the name of a form in your database. |
| **Open Report** | Open a report in print mode. Note that the report will print automatically. | Select the name of a report in your database. |
| **Open Report (preview)** | Open a report in preview mode. | Select the name of a report in your database. |
| **Open Subform** | Open a form within the UI Builder menu screen. | Select the name of a form in your database. |
| **Open Subform (add only)** | Open a form within the UI Builder menu screen in Add-only mode. This means the user will not be able to see existing records in the table, only add new records. | Select the name of a form in your database. Refer to the "**Error! Reference source not found.**" section for options on filtering records when the button is clicked by the user. |

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| Button Action | Description | Action Detail Options |
|---|---|---|
| **Open Subform (read-only)** | Open a form within the UI Builder menu screen in read-only mode. This means the user will not be able to edit the records displayed. | Select the name of a form in your database. Refer to the "**Error! Reference source not found.**" section for options on filtering records when the button is clicked by the user. |
| **Open URL** | Opens a web URL specified in the Action Details field. | Provide the URL, beginning with HTTP:// |
| **Print Screen** | Print the current screen. Note that it will only print the visible screen, including menu. We recommend creating a report if you wish to print in a specialized format. | None. |
| **Run Code** | Runs a VB function that you enter into the Action Details field. Note that Subroutines cannot be run with this option. | Pass any desired parameters to the Function in the Action Detail field, e.g.: fMyCode("parameter") |
| **Run Code (delivered)** | No longer used. | No longer used. |
| **Run Macro** | Executes a macro that you specify in the Action Details dropdown. | Select the name of a macro in your database. |
| **Run Query** | Opens a query you specify in a new window. | Select the name of a query in your database. |

### *2.5.3 Advanced Menu Configuration*

UI Builder 2.4 and higher support the ability to configure a menu button to open a form in the Main Subform window using a filtered or limited recordset. You may want to set two menu buttons to display the same form, but each button should display different information in the form. For example, one button opens the Accounts form and shows only records where a field "Active" is equal to true. Another button opens the Accounts form, but shows records where the Account-Type field is equal to "Prospect." To accomplish this, you would set the Action Details field of the UI Builder menu setup form as follows:

```
frmCustomer:RECORDSOURCE:SELECT * FROM
[tblCustomer] WHERE [Account-Type] = 'Prospect'
```

In the example above, the form "frmCustomer" will be opened in the Main Subform window with the recordset limited to only those records where Account-Type equals 'Prospect.' Use this method where you do not want users to be able to clear the form filter and view other records in the table.

```
frmCustomer:FILTER:[Active] = -1
```

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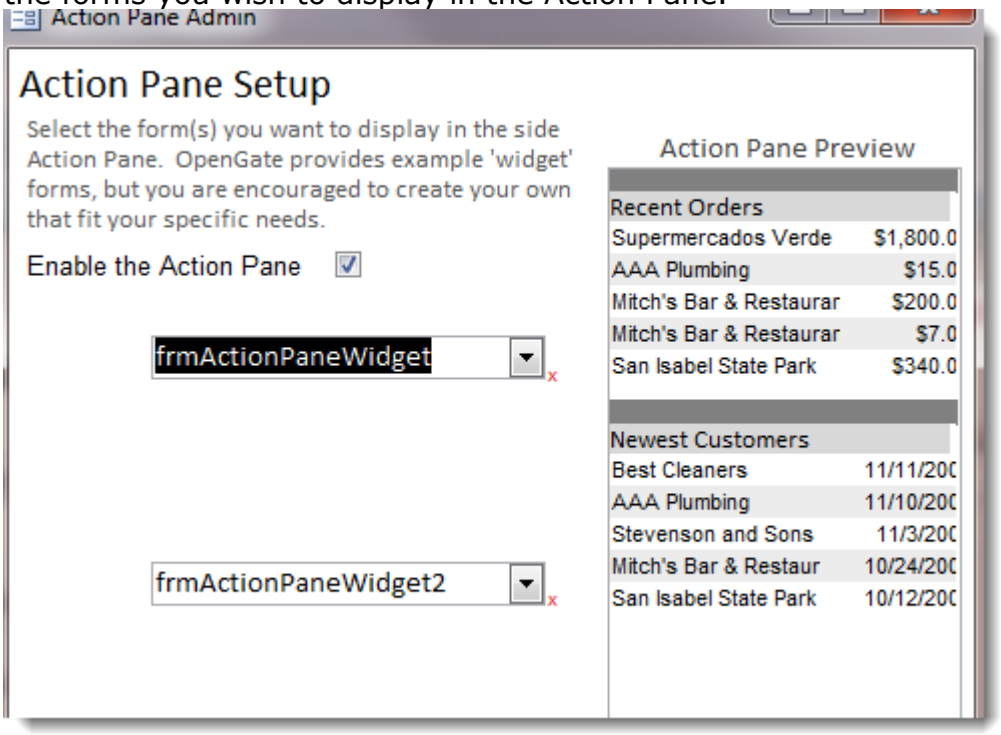
In the example above, the form "frmCustomer" will be opened in the Main Subform window and filtered to only show those records where Active equals True. Use this method where you are not concerned about users clearing the form filter and viewing other records in the table.

## 2.6 RIGHT-HAND ACTION PANE

Several UI Builder menu layouts support a persistent right-hand Action Pane that you can configure to display small forms as individual resizable panels within the Action Pane. For example, you may want to display a form with a list of recent new orders or statistics. To set up the Action Pane, make sure you are using one of the following menu layouts: Left (large), Expanding Menu (left), or the Top (large) menu layout. In the UI Builder Administration form, you can launch the Action Pane setup screen (frmActionPaneAdmin). In the dialog, select the forms you wish to display in the Action Pane.


Action Pane Admin
Action Pane Setup
Select the form(s) you want to display in the side Action Pane. OpenGate provides example 'widget' forms, but you are encouraged to create your own that fit your specific needs.
Enable the Action Pane
frmActionPaneWidget
frmActionPaneWidget2
Action Pane Preview
Recent Orders
Supermercados Verde $1,800.0
AAA Plumbing $15.0
Mitch's Bar & Restaurar $200.0
Mitch's Bar & Restaurar $7.0
San Isabel State Park $340.0
Newest Customers
Best Cleaners 11/11/200
AAA Plumbing 11/10/200
Stevenson and Sons 11/3/200
Mitch's Bar & Restaur 10/24/200
San Isabel State Park 10/12/200

Several example forms are provided with UI Builder. All begin with "frmActionPane...Widget." You can use these forms as examples for how to create your own Action Pane forms. Two example forms "frmActionPaneWebWidget#" can be changed to display different websites by selecting the "Edit" button when displayed.

**Note**
After enabling the Action Pane, you will need to restart UI Builder in order to see the Action Pane if you have upgrade from an earlier version..

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## 2.7 RESIZE FORMS

UI Builder – Business Edition offers three distinct skins (layouts) in two resolutions. If you wish to resize and save the main menu form(s), open the form in Form Design mode to accommodate a different screen resolution. Any changes to the "frmMain_" forms will be overwritten when you upgrade UI Builder, unless you override the upgrade function for that object. Refer to section 4 of this document for instructions on overriding the upgrade process for a specific form.

## 2.8 UNIVERSAL SEARCH

A new feature in UI Builder 3.4 is a universal search box that allows your users to search your forms.

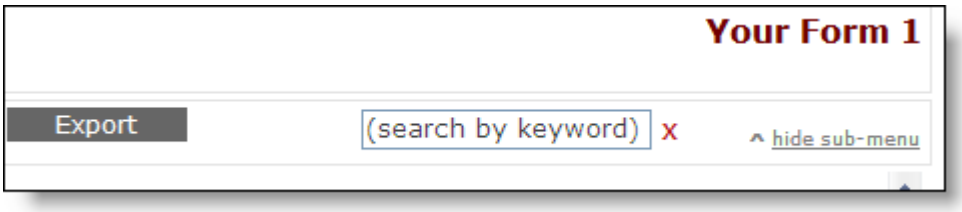


**Figure 1: Universal Search Box**

The search box will appear when a user opens any form in the main subform window, the form is bound to a data source, and one or more fields on the form has the tag of 'search'.

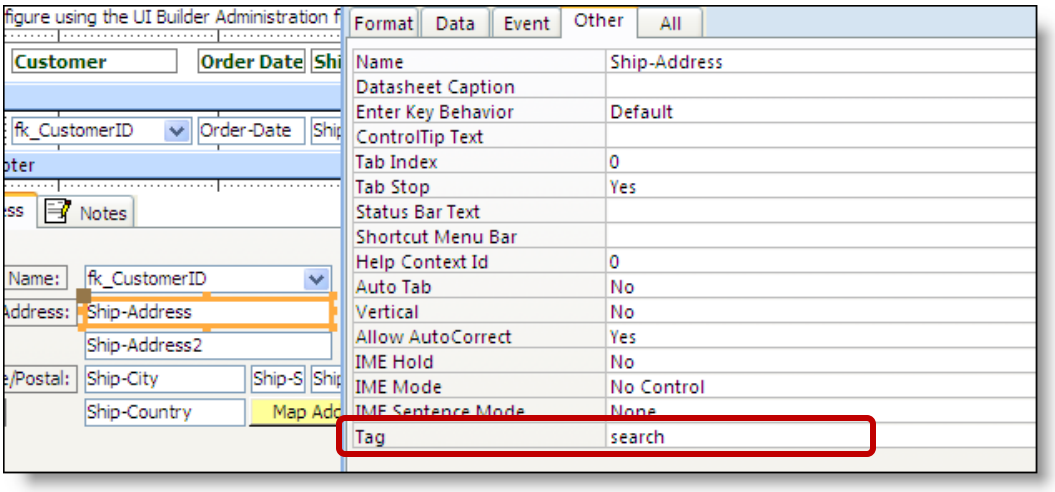


**Figure 2: Control Tag Property**

If a form is not bound to a data source, or no fields have the tag "search", the search box will not be visible.

> **Note**
> You can disable the universal search if needed by changing the constant gblnEnableUniversalSearch to 'False'. The constant is located in the module modMenu.

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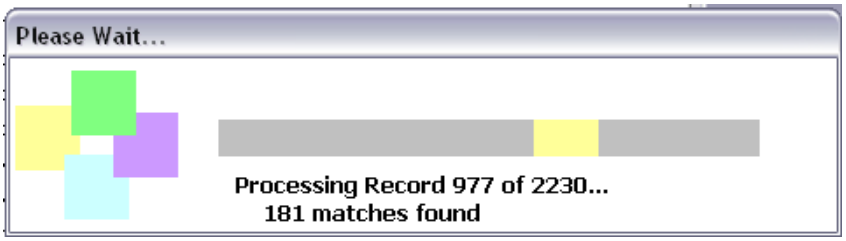
# 3 VBA Toolbox

The UI Builder – Business Edition comes with a set of pre-packaged VBA functions in the module "modVBAToolbox." Several of these functions are collected from other sources, and are included as part of the price of UI Builder, but simply a convenience to our customers.

## *3.1 PROGRESS BAR*

**Description**

The progress bar is used to notify the user of the present state of the application. The progress bar is more visible than the status bar (acSysCmdSetStatus) function, and does not require an ActiveX control, which can sometimes be problematic in a multi-user environment where each machine has different versions of the Microsoft Common Controls ActiveX file. Note that the progress bar allows you to specify the text to display to the user, but does not provide a % complete visualization, just an indication that the system is still working.




**Progress Bar Example**

**Function Name**

*fProgressUpdate*

**Parameters and Use**

*strUpdateText* – String Variable. Populates the text shown on the progress bar. Up to two lines of text can be displayed as shown in the example above.

*iPercent* – A whole number that represents the percent of the progress to represent on the bar.

Note that you must open and close the form in our code using the Docmd.OpenForm and Docmd.CloseForm commands.

Depending upon how intense your processing is, you may need to also insert the "DoEvents" command into your code to let Access refresh the form occasionally.

**Example**

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```
Docmd.OpenForm "frmProgress"

fProgressUpdate "This is the text that would be displayed" & vbCrlf &
"on two different lines in the progress bar"
        (your own code doing something here)
fProgressUpdate "Next status update you want to provide"
DoEvents
        (your own code doing something here)
fProgressUpdate "Next status update you want to provide"
DoEvents
(your own code doing something here)

        Docmd.CloseForm "frmProgress"
```

## 3.2 EVENT LOGGING

The Event Log function in UI Builder provides a way for you to log important events to a local or remote table, or to an XML output file in the location you specify. There are three functions that are used for event logging, one to initialize the log, the second to write to the log, and the third to close the log when finished. To optimize performance, if you are using a table to log events, the table will remain open for the duration of the user's session, or until you intentionally close the log with the fCloseLog() function.

If you choose to write to the log table ("tblEventLog"), you can locate the table locally on the PC where your database application is used, or copy the table to a file server and then link the table back to your user's database.

Similarly, you can choose to store the XML event log on the local PC where the database is being used, or to a central location such as a file server.

> **Important!**
> Each copy of your database application can write to the same remote log table (linked) or central file. Note that each copy of your database application will have it's own settings and if you want to change them universally, you will need to do so for each copy.

### 3.2.1 CONFIGURING THE LOG

To configure the log, open the Administration form/subform, or open the form "frmLoggingAdmin" from the database window.

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**Logging Administration Form**

You can choose to turn logging on or off for the current Access database, specify if log events should be written to the event log table, or a file location you specify. Note that if you specify a file name, you will need to provide a fully qualified path name and file name in the "Log Location" field. The file format will be XML (without header/footer), and will not depend upon the file name extension you supply in the "Log Location" field.

The logging level will dictate whether certain events are written to the log or not. When you define a log event you can indicate if it is a Normal or Debug event. If you have the Logging Level set to "Debug," all events will be written to the log. If set to "Normal," only normal events will be written to the log, Debug events will be ignored.

Finally, you can send an email to a designated administrator when certain events occur. There are three values for the "Event Emails" setting:

**Never** – Events will never be emailed to the Administrator.

**Defined Events** – Only events where the parameter "blnEmailAdmin" is set to True in the fLogEvent() function.

**Critical Errors** – Any event where the parameter "intEventType" is set to "auiCriticalError" will be emailed to the designated administrator.

### *3.2.2 INITIALIZING THE LOG*

**Description**

The function fInitializeLog() obtains logging settings from the table tblAppInfo, such as where log events should be written to (table or file), what level of log events will be written, and what email address should be used to email log events, if any. The function is automatically called whenever the main form (frmMain) is opened. If

you want to log specific events that might happen before the main form is ever opened, you will need to call fInitializeLog, otherwise it is done automatically for you.

**Function Name**

fInitializeLog

**Parameters and Use**

No parameters.

### *3.2.3 Writing to the Log*

**Description**

Writing to the log can occur at any time after the log is initialized.

**Function Name**

fLogEvent

**Parameters and Use**

*strDescription* - Description of the event which will be passed to the user and/or table/file.

*intEventLevel* - Determines if the event will be written to the table/file based on the application's logging level (normal/debug).

*blnAlarmUser* - If set to True, the user will see a popup alert with the text of the event.

*strSource* - The source of the event.

*intEventType* - Category of the event to help you understand if it is informational, an error, or critical error.

*blnEmailAdmin* - Determines if the event is emailed to an administrator. There are three modes, the default being only those events where they blnEmailAdmin is explicitly set to True. Alternatively, you can set the system to email no events, or critical errors, in which case it doesn't matter whether blnEmailAdmin is True or False when passed in. Note that blank = Never email events.

**Example 1**

```
fLogEvent "Loading Menu", auiDebug, False, "fLoadMenu()",
auiInformation
```

In this example, we are logging an event with description "Loading Menu" that will only be captured if the Logging Level = Debug, we won't alert the user, and the origin is "fLoadMenu()". This is an informational event. No email will be sent to the administrator. If the Logging Level = Debug, this is how the event will appear in the log table:

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| 8/5/2007 1:03:33 AM | Loading Menu | fLoadMenu() | USER123 | USER123-LAP | Informational | Debug |
|---|---|---|---|---|---|---|

**Example 2**

```
fLogEvent err.Description, auiNormal, True, "fMyFunction(" &
strMyVariable & ")", auiCriticalError, True
```

In this example, we are logging an event with description of the Access error that occurs (generally when you are using error handling in a function). It will only be captured regardless of the Logging Level, and we will alert the user. The origin is "fMyFunction" and we will also log the information that was passed into the function through strMyVariable. This is a critical error.

**User Alert Dialog**

### *3.2.4 Closing the Log*

**Description**

The function fCloseLog() simply closes down the log function and, if necessary, the log table recordset as well. The function is automatically called whenever the main form (frmMain) is closed.

**Function Name**

fCloseLog

**Parameters and Use**

No parameters.

### *3.2.5 Viewing the Log*

If you save log events to the XML output file, you will need to open the file by navigating to the location and opening it. If you write log events to the event log table, you can view the event records by opening the hidden form frmLogViewer or by selecting "Click Here To View Event Log>>" from the Logging Administrator form.

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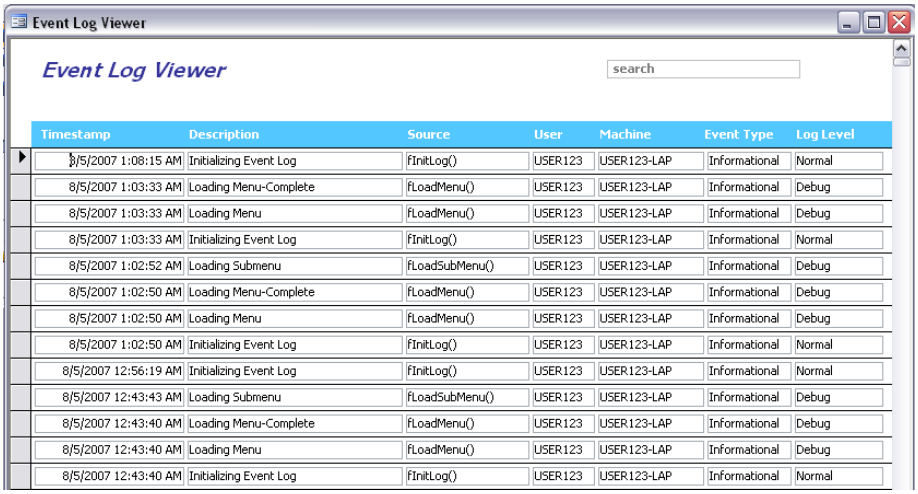
Event Log Viewer
Event Log Viewer
search
Timestamp
Description
Source
User
Machine
Event Type
Log Level
8/5/2007 1:08:15 AM Initializing Event Log fInitLog() USER123 USER123-LAP Informational Normal
8/5/2007 1:03:33 AM Loading Menu-Complete fLoadMenu() USER123 USER123-LAP Informational Debug
8/5/2007 1:03:33 AM Loading Menu fLoadMenu() USER123 USER123-LAP Informational Debug
8/5/2007 1:03:33 AM Initializing Event Log fInitLog() USER123 USER123-LAP Informational Normal
8/5/2007 1:02:52 AM Loading Submenu fLoadSubMenu() USER123 USER123-LAP Informational Debug
8/5/2007 1:02:50 AM Loading Menu-Complete fLoadMenu() USER123 USER123-LAP Informational Debug
8/5/2007 1:02:50 AM Loading Menu fLoadMenu() USER123 USER123-LAP Informational Debug
8/5/2007 1:02:50 AM Initializing Event Log fInitLog() USER123 USER123-LAP Informational Normal
8/5/2007 12:56:19 AM Initializing Event Log fInitLog() USER123 USER123-LAP Informational Normal
8/5/2007 12:43:43 AM Loading Submenu fLoadSubMenu() USER123 USER123-LAP Informational Debug
8/5/2007 12:43:40 AM Loading Menu-Complete fLoadMenu() USER123 USER123-LAP Informational Debug
8/5/2007 12:43:40 AM Loading Menu fLoadMenu() USER123 USER123-LAP Informational Debug
8/5/2007 12:43:40 AM Initializing Event Log fInitLog() USER123 USER123-LAP Informational Normal

**Event Log Viewer**

## *3.3 TABLE RECORD COUNT*

### Description

The function fTableRecordCount enables you to quickly obtain a count of records in a specified table using an SQL string you supply. You can call this function from a form field, or from another VBA function. This function provides a simple alternative to the Access DCount() function, with embedded error handling and event logging.

For example, you may have a field on a form "Customers" that you want to show the user the number of customers currently in your database. You could insert this function into the read-only field to display that information to them. Of you may have a function where your processing depends upon whether there are records in a specific table, or a specific number of records in that table meeting a given criteria.

### Function Name

fTableRecordCount

### Parameters and Use

*strTable* –Provide a valid table name (linked or local) for the current database

*strSQL* – Provide a valid SQL string beginning with "WHERE…" If you want to count all records in the table, simply pass "" in the variable.

*blnDisplayErrors*– Optional. Set to False if you do not want this function to display an error to the user if something goes wrong. For example, if you have this function called multiple times, you may not want to alert the user every time an error occurs. If left blank, UI Builder will display any error messages.

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**Example 1**

lngRecords = fTableRecordCount("tblMyTable","")

In this example, a value will be returned to lngRecords for the number of records contained in the table "tblMyTable." No SQL criteria will be applied.

**Example 2**

lngRecords = fTableRecordCount("tblTableX","WHERE [CustomerID] = " & me.customerid.value)

In this example, a value will be returned to lngRecords for the number of records contained in the table "tblTableX" where the CustomerID field is equal to a value passed from the current form for the field "customerid."

## *3.4 TABLE RECORD SUM*

**Description**

The function fTableRecordSum enables you to quickly obtain a sum of records in a specified table field using an SQL string you supply. You can call this function from a form field, or from another VBA function. This function provides a simple alternative to the Access DSum() function, with embedded error handling and event logging.

For example, you may have a field on a form "Revenue" that you want to show the user the amount of revenue this month. You could insert this function into the read-only field to display that information to them. Or you may have a function where your processing depends upon whether you have generated a specific amount of revenue from orders.

**Function Name**

fTableRecordSum

**Parameters and Use**

*strTable* –Provide a valid table name (linked or local) for the current database

*strSumField* – Designate the name of the field in *strTable* that contains the data you want to sum together.

*strSQL* – Provide a valid SQL string beginning with "WHERE…" If you want to count all records in the table, simply pass "" in the variable.

*blnDisplayErrors*– Optional. Set to False if you do not want this function to display an error to the user if something goes wrong. For example, if

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you have this function called multiple times, you may not want to alert the user every time an error occurs. If left blank, UI Builder will display any error messages.

**Example 1**

lngRecords = fTableRecordSum("tblMyTable","MyField","")

In this example, a value will be returned to lngRecords for the sum of values contained in the field "MyField" in table "tblMyTable." No SQL criteria will be applied.

**Example 2**

lngRecords = fTableRecordSum ("tblTableX","MyField", "WHERE [Order-Date] > #1/1/2007#")

In this example, a value will be returned to lngRecords for the sum of values contained in the field "MyField" in table "tblTableX" where the Order-Date field is greater than 1/1/2007.

## *3.5 TABLE RECORD VALUE*

**Description**

The function fTableRecordValue enables you to quickly obtain a value from a field in a specified table field using an SQL string you supply. You can call this function from a form field, or from another VBA function. This function provides a simple alternative to the Access DLookup() function, with embedded error handling and event logging.

For example, you may have want to fetch the current value of a field that is in a table other than the one your form uses as the data source. You could insert this function into the read-only field to display that information to them. UI Builder uses this function, as an example, to change the color scheme on some forms to conform to the color scheme you choose. The form load event obtains your currently active color scheme's menu button color to paint the menu administration form buttons the same color.

**Important!**
This function will return the first value found in the data source for the field you specify. If you happen to have multiple records in the data source that match your SQL expression, UI Builder will only return the first record found.

**Function Name**

fTableRecordValue

**Parameters and Use**

*strTable* –Provide a valid table name (linked or local) for the current database

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*strField* – Designate the name of the field in *strTable* that contains the data you want to fetch.

*strSQL* – Provide a valid SQL string beginning with "WHERE…" If you want to count all records in the table, simply pass "" in the variable.

*blnDisplayErrors*– Optional. Set to False if you do not want this function to display an error to the user if something goes wrong. For example, if you have this function called multiple times, you may not want to alert the user every time an error occurs. If left blank, UI Builder will display any error messages.

**Example 1**

```
lngButtonColor = fTableRecordValue("tblColorScheme", "MenuButtons",
"WHERE [ActiveScheme] = -1", False)
```

In this example, a value will be returned to lngButtonColor for the first value contained in the field "MenuButtons" in table "tblColorScheme" where the scheme is currently active. Errors will not be displayed to the user if they occur.

## 3.6 FILE CHECK

**Description**

The function fFileExists allows you to validate whether a file exists or not. When you call fFileExists with a filename, it will respond with a True/False to your function to indicate if the file exists or not.

**Function Name**

fFileExists

**Parameters and Use**

*strFileName* – Supply the name of the file you want to determine if it exists or not.

**Example**

```
blnMyVariable = fFileExists("C:\Win.ini")
```

The function will return a True/False value to your calling function for the file "C:\Win.ini"

## 3.7 OPERATING SYSTEM NAME

**Description**

The code for this function is courtesy of Dev Ashish. Call the function within any other function to retrieve the name of the operating system upon which your Access database application is running.

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**Function Name**
fOSName

**Parameters and Use**
No Parameters.

## *3.8 NETWORK USERNAME*

**Description**
The code for this function is courtesy of Dev Ashish. Call the function within any other function to retrieve the network username for the machine on which your Access database application is running.

**Function Name**
fOSUserName

**Parameters and Use**
No Parameters.

## *3.9 MACHINE NAME*

**Description**
The code for this function is courtesy of Dev Ashish. Call the function within any other function to retrieve the name of the machine on which your Access database application is running.

**Function Name**
fOSMachineName

**Parameters and Use**
No Parameters.

## *3.10 CREATE OUTLOOK TASK – DIRECT FUNCTION CALL*

**Description**
UI Builder helps users create Outlook tasks quickly and efficiently, without ever leaving your database application. Simply configure a menu button to use the "Create Outlook Task" command, and UI Builder takes care of the rest. When clicked, the user is prompted to add details about the task, click "Create Task>>", and they continue working on what they were doing without the normal multi-step process. To call the create task function directly, use the fAddOutlookTask function. For example, you might add an event that automatically creates an Outlook task to confirm an order shipped up five days in the future when a new order is entered.

**Function Name**

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fAddOutlookTask

**Parameters and Use**

*strSubject* – The subject of the Outlook Task.

*strBody* – The details for the task created.

*dtDueDate* – Optional due date. If not supplied, the current date will be used.

Return Value – Yes/No value indicating if the merge was successful or failed.

**Example**

See the form frmExamples for an example of the methods used to create Outlook tasks.

## *3.11 MAIL MERGE API – DIRECT FUNCTION CALL*

**Description**

UI Builder provides the ability to let users click a menu or submenu button and generate a mail merge letter or email based on a predefined Mail Merge Profile. If you want full control over how the mail merge will function, use the fMerge() function call directly.

**Function Name**

fMerge

**Parameters and Use**

*strMergePath* – Provide the full filename for the mail merge template document, or "Prompt User" to have the user select a template when the mail merge is run.

*strDataSource* – Provide the text name of the table or query to be used in the mail merge. Be sure the data source contains all the data fields that the mail merge template also uses to prevent user error messages from Microsoft Word.

*strWhereStatement* - Provide a valid SQL statement, beginning with "WHERE ", or leave as "" to select all records from the specified data source.

*strMergeOption* - Specify the type of mail merge. *Valid values are*

*mrgPrint* – Print the merged document immediately
*mrgPreview*– Open the merged document for editing
*mrgMail* – Send the merged email immediately
*mrgMailPreview*– Open the merged email for editing

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*strSubject* – Email subject line. If the merge option mrgMail or mrgMailPreview is selected, this variable must be populated.

*strEmail* - Email recipient(s). Use semi-colons for multiple recipients. If the merge option mrgMail or mrgMailPreview is selected, this variable must be populated.

*blnKeepOpen* - True/False value that indicates if the document should remain open if using the mrgPrint method.

Return Value – Yes/No value indicating if the merge was successful or failed.

## 3.12 NOTE EDITOR

**Description**

Note Editor gives you the ability to condense a memo or long text field on screen, saving valuable form real estate. You place a button next to the field, or create an OnDoubleClick event, that calls the fNoteEditor function to present a small form that allows users to view and/or edit the contents of the field. The results of the user's edits are returned in the function's return variable.

**Function Name**

fNoteEditor

**Parameters and Use**

*strNote* - The current text contained in the field, if any.

*blnReadOnly*- True/False. Specify if the Note Editor should allow the user to edit the notes, or just read them.

Return Value – Text supplied by the user, or original text if no changes were made.

## 3.13 TOAST POPUPS

**Description**

Toast popups allow you to display an informational message to the user for a short period of time similar to email message notifications now available in most email clients.

**Function Name**

fDisplayPopup

**Parameters and Use**

*strHeader* - The header/title text that will appear at the top of the popup message in bold. Similar to the title bar of a message box.

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*strText*- The main text to display to the user.

*iDisplaySeconds*- Optional. Indicates how long the popup message should show. By default, the message will show for 5 seconds.

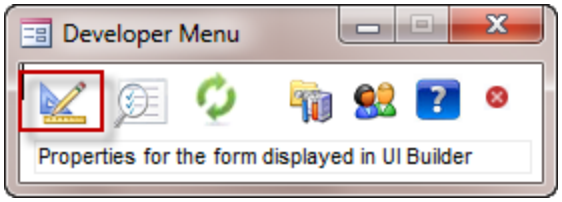
*blnLegacyMode*- Optional. Indicates that UI Builder should use the expanding popup mode which was present in UI Builder 3.0.

# 4 Developer Tools and Tips

## 4.1 DEVELOPER MENU

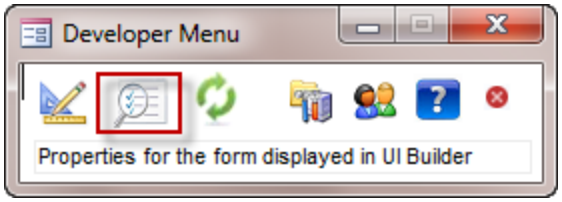
The UI Builder Developer Menu is a tool to help you design and manage your forms within UI Builder with greater ease. The floating menu can be dismissed at any time, and allows you to configure which users (by username) are authorized to see the Developer Menu.

### 4.1.1 ENABLING THE DEVELOPER MENU




The Developer Menu is available by default, but can be dismissed at any time by clicking the small red "close" icon in the menu. To restore the menu, select the "Enable UI Builder Developer's Menu" from the main administration form (frmAdministrator) "Advanced Settings" tab.

### 4.1.2 FORM DESIGN




Select the Design icon in the Developer Menu to be able to design the form currently displayed within the UI Builder menu. Select the same icon to restore your form to display within UI Builder.

### 4.1.3 FORM PROPERTIES

Select the Properties icon to view the properties of the form currently displayed within UI Builder. This is helpful when you need to research or troubleshoot your form's behaviour. For example, the form may have "Allow Additions" set to "False," which would explain why your users are not able to add new records. You can then research whether the menu button is configured to open the form in read-only mode, or code in your form is affecting the form's behaviour.

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## 4.2 CHANGING THE FORM DISPLAYED IN UI BUILDER FROM CODE

To programmatically change the subform displayed within the UI Builder menu, you can use the sChangeSubform command.

**Parameters and Use**

*iButton* - Always use the number 0 for this argument.

*strCommandDetail*- The form you want to display.

*blnFromSubcommand*- *Always use True for this argument*.

The following example will change the form displayed within UI Builder to the form "frmMyForm":

```
sChangeSubform 0, "frmMyForm",True
```

**Advanced Use**

You can also tell UI Builder to perform an action after sChangeSubform changes the subform displayed in UI Builder.

To filter the form when it opens, use the following convention:

```
sChangeSubform 0, "frmMyForm:FILTER:[CustomerID] = " & CustomerID.Value ,True
```

In the example above, the form "frmMyForm" will be displayed, and then filtered to only show records where the CustomerID on the record equals the CustomerID on the form that executed the command.

To change the form's recordsource when it opens, use the following convention:

```
sChangeSubform 0, "frmMyForm:RECORDSOURCE:SELECT * FROM [tblCustomer] WHERE [CustomerID] = " & CustomerID.Value ,True
```

In the example above, the form "frmMyForm" will be displayed, and the recordsource will be changed to the SQL statement provided.

To go to a specific record in the form when it opens, use the following convention:

```
sChangeSubform 0, "frmMyForm:GOTO:[CustomerID] = " & CustomerID.Value ,True
```

In the example above, the form "frmMyForm" will be displayed, and the focus will change to the first record with a matching Customer ID to that specified by the form that executed the command.

## 4.3 ADDING MENU BUTTONS

OpenGate has created a whitepaper with information about how to add more menu and submenu buttons to the UI Builder menu, as well as alternate options. Click here to open the whitepaper.

# 5 Upgrading UI Builder

This section has been moved to a separate guide. Please refer to the separate UI Builder Upgrade Guide for information.

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# 6 One-Click Mail Merge

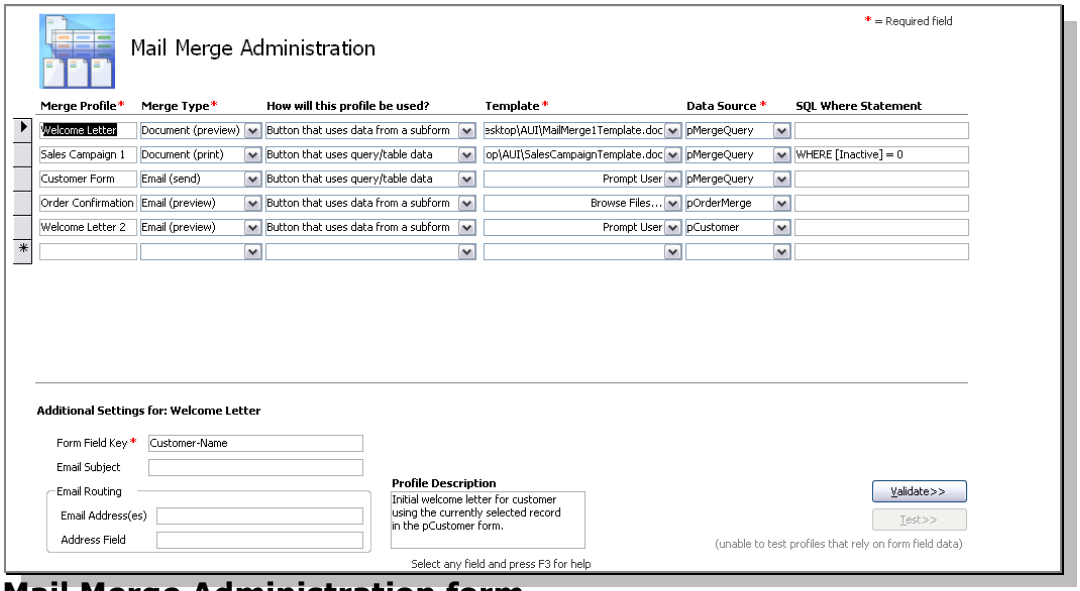
Microsoft Access allows you to create formatted reports for printing, but in today's business environment, where formatted emails are far more effective and more frequently needed, MS Access falls short. Reports must be emailed as RTF or Snapshot format attachments, with lack the same appearance to the recipient, or require the recipient to download the Microsoft Snapshot viewer.

UI Builder gives you the ability to offer users One-Click Mail Merge to email. You establish a profile for each Mail Merge button you will let the user choose from, which includes the location of the mail merge template, the merge data source, what action to take (print, email, display for editing), SQL filters to apply, and which fields on the displayed form to use to pull merge data. For example, you may want users to be able to view a customer record, click a menu button, and have an email message automatically sent to the customer displayed on screen. With UI Builder's One-Click Mail merge, you can add that capability to your database applications without a single line of Visual Basic code.

> **Important!**
> Due to limitations in Office 2000 and below, One-Click Mail Merge is only supported in Office 2002 and higher.

## 6.1 MAIL MERGE PROFILES

The first step is to create one or more Mail Merge Profiles that will drive the command button behaviour for a mail merge activity. Navigate to the Mail Merge Administration form either by clicking on the button in the Tools tab of the main Administrator form, or by opening the hidden form "frmMergeAdmin" directly.




**Mail Merge Administration form**

*Merge Profile* – Enter a brief name for the Merge Profile.

*Merge Type* – Specify whether the merge command will open a document to print, preview, create a single email that is sent immediately, opened for editing, or generate a mass email merge. Depending upon your selection, several fields may be required to complete the merge profile, and a red asterisk (*) will appear next to these fields.

*How Will This Profile be Used?* – Indicate how you plan to use the Mail Merge Profile. Valid values are:

**Button that uses query/table data** – This option means you plan to perform a mail merge that will not be directly related to data currently displayed to the user on a form. Instead, the merge will operate based on the data source and any SQL Where statement you provide.

**Button that uses data from a subform –** This option means that you will specify a field on a subform that will be used to select the right data to merge when the user selects a menu button or command button you create. If you select this option, several fields will be required to complete the merge profile, and a red asterisk (*) will appear next to these fields. For example, you may want to have a submenu button that allows the user to merge the currently displayed customer record to an email document, using the CustomerID field as the merge filter criteria. Note that this option is not available for mass email merges.

*Template* – Specify the location of a valid mail merge template document, or choose "Prompt User" to have UI Builder ask the user to locate the template document each time they run the mail merge.

*Data Source* – Select a table or query that will be used to obtain the mail merge data.

*SQL Where Statement* – Optionally provide a valid SQL statement, beginning with "WHERE ", or leave blank to select all records from the specified data source.

*Form Field Key* – If you will be using information on the subform displayed to the user at the time they initiate the mail merge, specify the data field name on that form that should be used at runtime to filter the mail merge data. For example, if there is a field "Customer-ID" on the form that you want to use when merging data from the pCustomer table, you would populate the Form Field Key with **Customer-ID**.

**Important!**
The Form Field Key name used must correspond to the name of the subform field and table field name. In other words, if you will be filtering the mail merge on Customer-

Name, the table field name must be Customer-Name, and so must the field name on the form. Otherwise you will receive an error that no records match the merge criteria, or an error that the field doesn't exist in the data source.

*Email Subject* – If the merge type will be to an email, provide a subject line to be used in the email.

Email Address(es) – If the merge type will be to an email, provide one or more email addresses separated by semi-colons, or complete the Address Field described below.

*Address Field* – If you will be using an email address from the subform displayed to the user at the time they initiate the mail merge, specify the email address field name on that form that should be used at runtime as the recipient's email address. If you plan to generate a mass email merge, you must specify the data field that contains email addresses in the table or query that you specified in the Data Source section of the Merge Profile.

*Profile Description* – This field can contain any notes you might want to keep about the merge profile for future reference. It is not used in the actual mail merge process.

## 6.2 OUTLOOK SECURITY WARNINGS

Microsoft Outlook 2002 and later will display warning messages when another application attempts to send email messages automatically on behalf of the user. We recommend you review the Microsoft documentation for information on ways to disable the warning, and decide whether doing so makes sense for your organization. For Access 2007 users, you can avoid receiving the security warning message by ensuring you have an active Anti-Virus client on your PC with email security. Access 2007 will only display the warning message for each email if your anti-virus is out of date or disabled.

## 6.3 CONFIGURING MENU COMMANDS

Once you have created a Mail Merge Profile, follow the normal steps to configure a menu or submenu button. In the Button Action field, specify "Mail Merge," and then select the appropriate Mail Merge Profile in the "Action Details" field.

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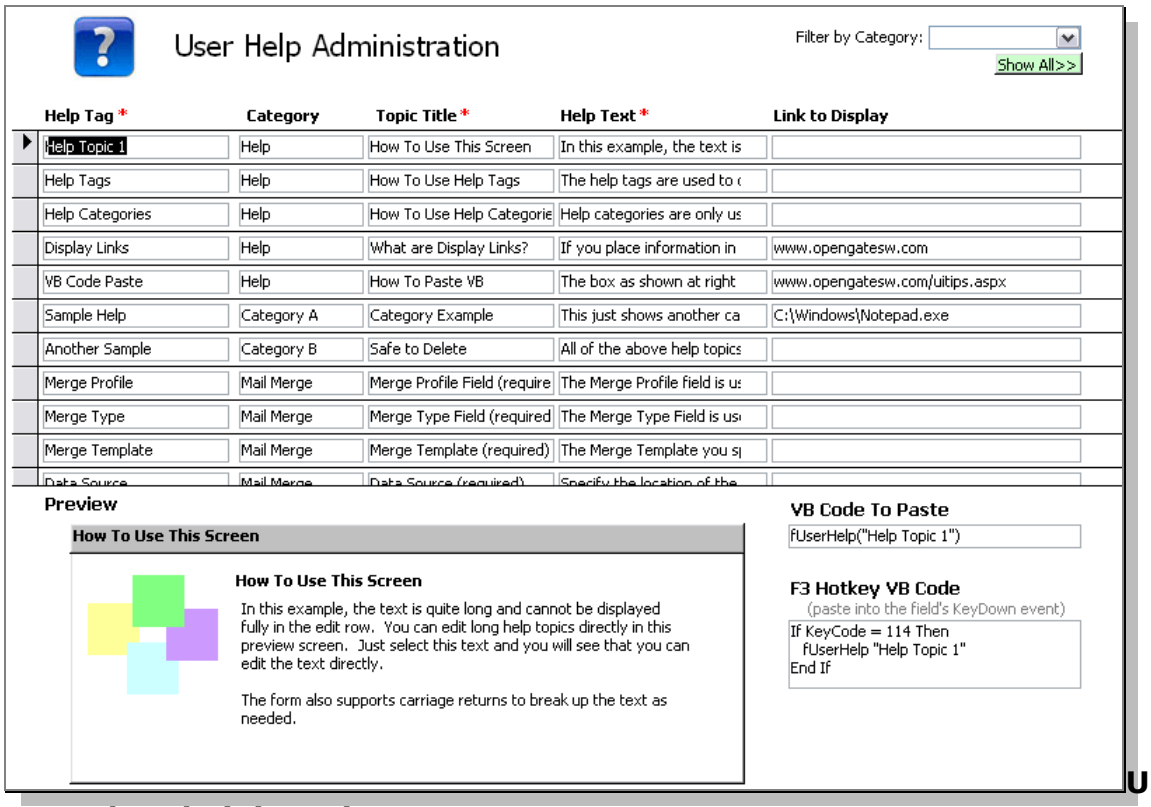
# 7 Dynamic User Help

Dynamic User Help provides a way to create user help topics that can be accessed via a hotkey (such as F3) or by adding a command button to your form. Once you have created your user help topics, and added the necessary VB code to your form(s), it is easy to change the user help without changing the VB code on each form. Simply change the user help topic in the User Help Administration screen. For multi-user environments, you can place the table tblUserHelp in a linked database that is centrally located, making it easy to change help topics once instead of for each user's database.

## *7.1 CREATING USER HELP TOPICS*

Navigate to the User Help Administration form either by clicking on the button in the Tools tab of the main Administrator form, or by opening the hidden form "frmUserHelpAdmin" directly.


User Help Administration
Filter by Category:
Show All>>
Help Tag *
Category
Topic Title *
Help Text *
Link to Display
Help Topic 1
Help
How To Use This Screen
In this example, the text is
Help Tags
Help
How To Use Help Tags
The help tags are used to
Help Categories
Help
How To Use Help Categorie
Help categories are only us
Display Links
Help
What are Display Links?
If you place information in
www.opengatesw.com
VB Code Paste
Help
How To Paste VB
The box as shown at right
www.opengatesw.com/uitips.aspx
Sample Help
Category A
Category Example
This just shows another ca
C:\Windows\Notepad.exe
Another Sample
Category B
Safe to Delete
All of the above help topics
Merge Profile
Mail Merge
Merge Profile Field (require
The Merge Profile field is us
Merge Type
Mail Merge
Merge Type Field (required
The Merge Type Field is us
Merge Template
Mail Merge
Merge Template (required)
The Merge Template you s
Preview
How To Use This Screen
How To Use This Screen
In this example, the text is quite long and cannot be displayed fully in the edit row. You can edit long help topics directly in this preview screen. Just select this text and you will see that you can edit the text directly.
The form also supports carriage returns to break up the text as needed.
VB Code To Paste
fUserHelp("Help Topic 1")
F3 Hotkey VB Code
(paste into the field's KeyDown event)
If KeyCode = 114 Then
fUserHelp "Help Topic 1"
End If

**User Help Administration screen**

*Help Tag* – Help tags are used to determine which help topic to display to the user when the perform a specific action. You define each help tag, and they must be unique. There are no rules as to what the tag must be.

*Category* – Help categories are only used to help you categorize your user help topics. You can assign a category to your help topics and then filter by

those categories as shown in the top right hand side of the User Help Administration screen.

*Topic Title* – Dialog box title and help topic title.

*Help Text* – The actual help text that will be displayed to the user.

*Link to Display* – Information in the display link field, it will appear to the user at the bottom of the help window. When they click on the link, it will attempt to open the associated file or website.

## *7.2 ADDING VISUAL BASIC FOR HOTKEYS*

You can enable a hot-key for a field such that if the user selects that key (we suggest F3), it will automatically display your help topic. Paste the text in the box at the right-hand side of the screen labeled "F3 Hotkey Code" into any fields KeyDown event to have that topic display to the user.

## *7.3 ADDING VISUAL BASIC FOR COMMAND BUTTONS*

Paste the text in the box at the right-hand side of the screen labeled "VB Code to Paste" into any button's OnClick event to have that topic display to the user.

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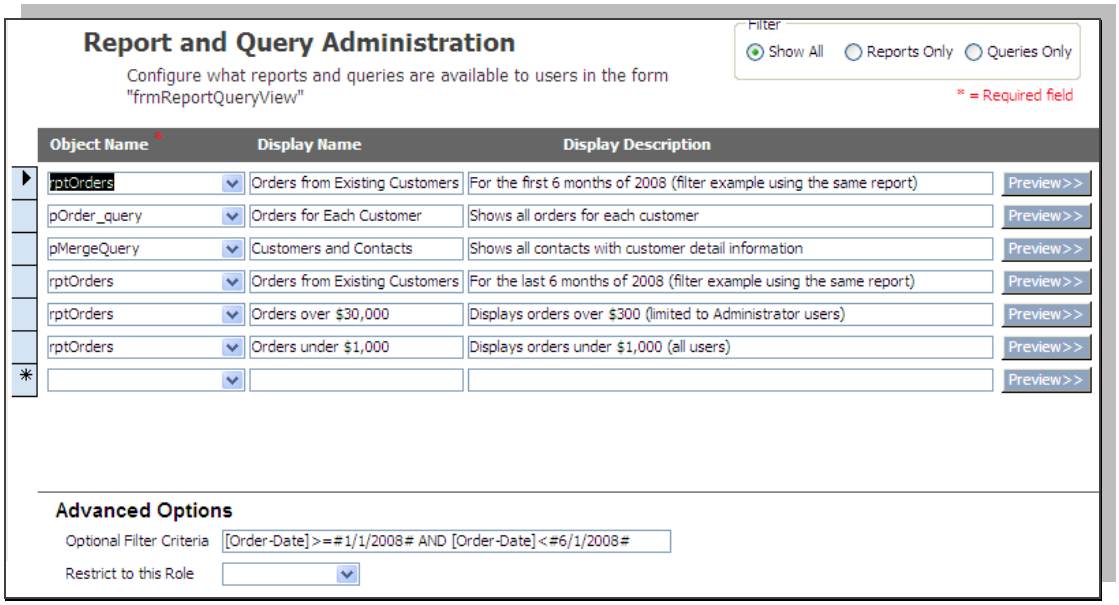
# 8 Report/Query Menu

The Report/Query menu (frmReportQueryView) allows you to present a simple menu of available reports and queries in your database to users, with plain-language names and descriptions.

## 8.1 REPORT/QUERY SETUP

To add reports and queries to the reports menu, open frmReportQueryAdmin, or access the form from the Tools tab in the Administration form (frmAdministrator).




| | |
|---|---|
| **Object Name** | The report or query to display on the menu. |
| **Display Name** | The name to display to the user. |
| **Display Description** | The description to display to the user. |
| **Optional Filter Criteria (reports only)** | You can optionally specify the filter criteria to use when the user opens, prints, or saves the report. |
| **Restrict to this Role** | Feature only available in UI Builder - Enterprise Edition |

# 9 Form Directory Menu

The Form Directory menu (frmFormDirectory) allows you to present a simple menu of available forms in your database to users, with plain-language names and descriptions. The forms may not be important enough to consume one of your main menu or submenu items, but users need access to the form(s) on occasion.

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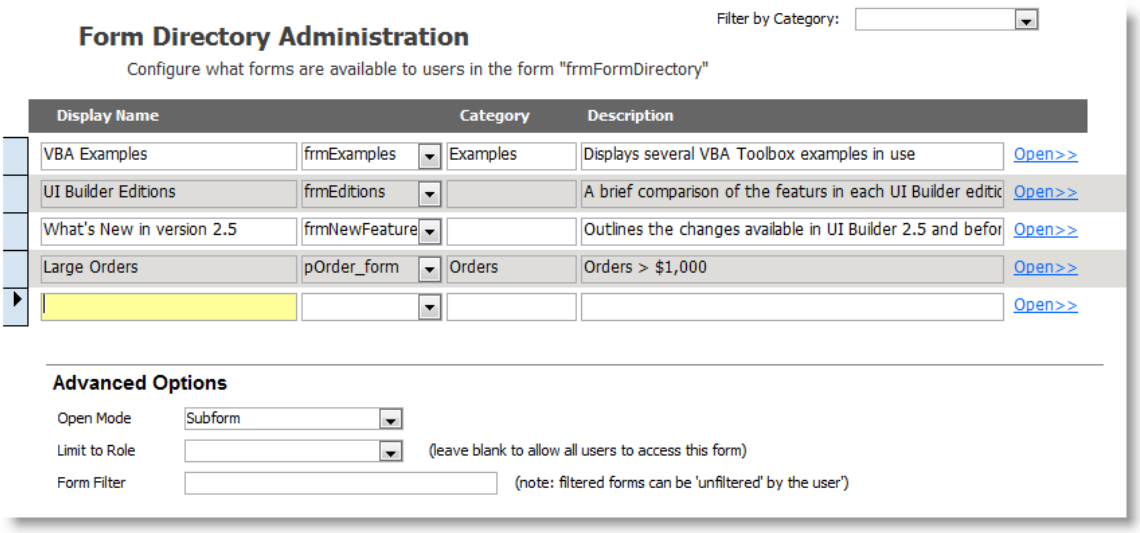
## 9.1 FORM DIRECTORY SETUP

To add reports and queries to the reports menu, open frmFormDirectoryAdmin, or access the form from the Tools tab in the Administration form (frmAdministrator).




| | |
|---|---|
| **Object Name** | The form to display on the menu. |
| **Display Name** | The name to display to the user. |
| **Category** | A self-assigned category. Type any text you want into the field to help users filter by category. |
| **Display Description** | The description to display to the user. |
| **Optional Open Mode** | How you want the form to open on screen. |
| **Optional Filter Criteria** | You can optionally specify the filter criteria to use when the user opens, prints, or saves the report. |
| **Limit to Role** | Feature only available in UI Builder - Enterprise Edition |

# 10 Managing Backups

UI Builder provides several options for automatically backing up your database on a regularly scheduled basis. From the main administration form (frmAdministrator), select "UI Builder Tools." Select the Backup Plan Setup button.

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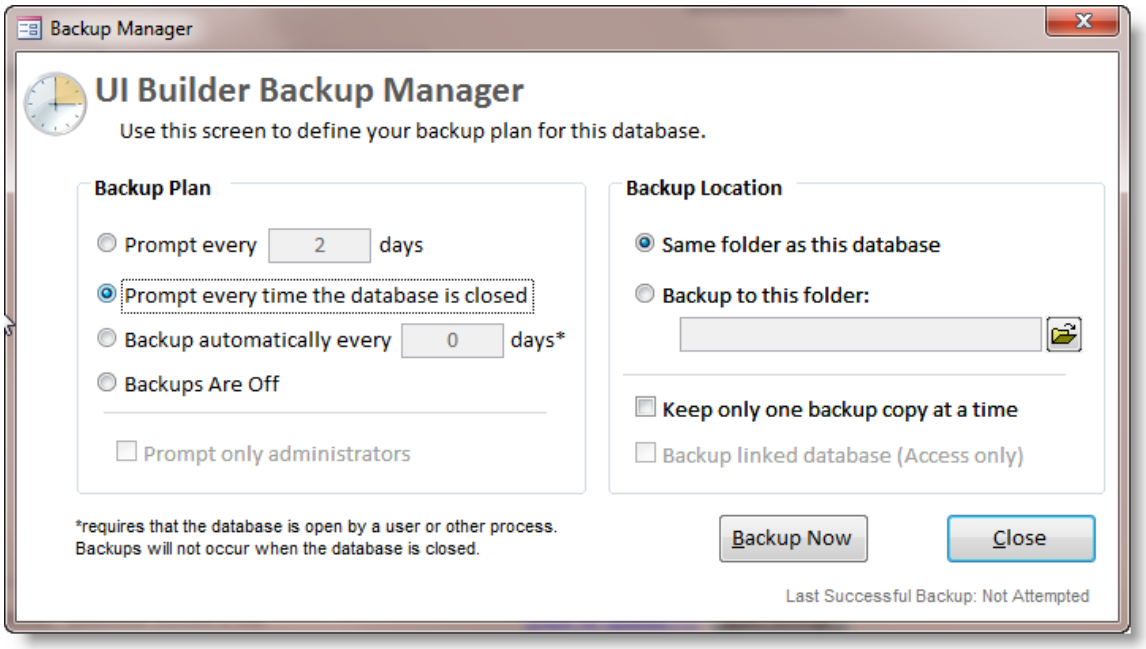
Backup Manager
UI Builder Backup Manager
Use this screen to define your backup plan for this database.
Backup Plan
Prompt every 2 days
Prompt every time the database is closed
Backup automatically every 0 days*
Backups Are Off
Prompt only administrators
Backup Location
Same folder as this database
Backup to this folder:
Keep only one backup copy at a time
Backup linked database (Access only)
*requires that the database is open by a user or other process.
Backups will not occur when the database is closed.
Backup Now
Close
Last Successful Backup: Not Attempted

**Figure 3: Backup Manager**

First establish the backup plan that fits your needs by selecting one of the radio buttons on the left hand side of the screen.

> **Important!**
> In all cases, your database must be open by at least one user for the backup to complete.

Choose the location for your backup in the right hand side of the screen. By default UI Builder will back up your database and add a unique timestamp to the backup file. Check the "Keep only one backup copy at a time" to cause UI Builder to maintain only one backup file at any one time.

The "Backup linked database" check box is available for UI Builder - Enterprise only. Selecting this checkbox will cause UI Builder to back up your linked database to the same location. Please note that UI Builder cannot back up an ODBC data source, such as a SQL Server table or database.

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# Release History

**Version 1.0** – Initial Release

**Version 1.1** – Minor changes to resolve various errors

**Version 1.2** – Enhancements to the Upgrade feature

**Version 1.3**
- Fixed modUpgrade function to prevent application from crashing during upgrade
- Fixed issue where upgrade function did not pull over new version number
- Added progress bar to VBA toolkit and upgrade
- Added dropdown to the Action Details fields in the Sub-Menu Administrator
- Fixed issue with custom color chooser if you didn't select a new color

**Version 1.3.1**
- Fixed logo not found error when opening the frmMain forms
- Added skins for 1280x1024 resolutions (previously optimized for only 1024x768)
- Fixed issue where upgrade function failed if an object to be upgraded had been removed from the current version
- Added capability to upgrade the modUpgrade module

**Version 1.3.2**
- Fixed flashing menu issue
- Automatically reloads color scheme if you enter VBA break mode
- Added new menu button option to open forms in read-only mode

**Version 1.4**
- Added ability to send email messages to application administrator when the event log is called for specific event types
- Added 3 more main menu buttons
- Fixed issue where subform tried to use Linked Child/Master Ids when changing subforms.

**Version 1.4.2**
- New Administrator form with tabs for easier navigation

**Version 1.4.3**
- Added ability to hide database window in new Advanced tab within Administrator form

**Version 2.0**
- User Help Administration
- One-Click Mail Merge
- Create Outlook Tasks
- Note Editor
- Added Examples form
- Eliminated main form open background loading with black buttons
- Progress Bar now can be incremented based on % completion

**Version 2.1**
- Ability to minimize main menu bar on left and right hand layouts (skins)
- Incorporated PowerBrowser capability
- Introduced Toast Popups (fDisplayPopup)

**Version 2.2**
- New Processing form (similar to Google Analytics)

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- New VBA Toolbox function - fTableRecordSum()
- Minor changes to sample Order and Customer forms
- New Dashboard demonstrates fTableRecordCount and fTableRecordSum capabilities
- Enhanced Report/Query screen to allow users to send email with object attached and view count of records contained in a query
- Added new button for Access 2007 to show or hide the navigation pane from the main form

**Version 2.3**

- Enhancements
  - New mass email merge capability.
  - New splash screen.
  - New "Open Form (add only)" menu option.
  - Add optional parameter to suppress errors in fTableRecordCount, fTableRecordSum, and fTableRecordValue functions. Suppressing errors ensures user's aren't prompted numerous times that an error exists if you create a dashboard or form that uses many invalid fTableRecord*** calls. By default errors are shown.
  - New "File Browse…" ability when "Open File" is chosen from the menu administration screens.
  - The subform administration (frmAdmin_submenu) form's "Action Type" dropdowns now support quick entry without requiring the user to display the full list.
  - Added improved validation to Mail Merge profiles to test that fields specified exist in the data source, general usability of the administration form has also been improved.
  - Enhanced the Color Scheme functionality support an unlimited number of user-defined color schemes. The color scheme editor also allows you to define the color for the Application Name, Screen Name, and Company Name text on the frmMain screen.
  - New Toast Popup form that fades in and out.

- Defect Resolutions
  - Fix to better support upgrade from Business to Enterprise (adds records to tblSubMenu for each role pre-defined in the Enterprise Edition brought over)

**Version 2.4**

- Enhancements
  - The Report/Query Viewer allows users to email reports as PDF documents in Access 2007.
  - New filter by event type feature to the Event Log viewer.
  - New Upgrade function is faster and more gracefully handles missing objects in the local database.
  - New feature allows you to configure a menu button to open a form with a filtered or alternate recordset.
  - New diagnostics utility to identify menu setup problems if you have manually imported different menu tables from another UI Builder-based database.
  - The Upgrade function now prevents a user from attempting to upgrade the database if they are in a locked database (MDE, ACCDR, ACCDE).

**Version 3.3**

(note: for simplicity, all UI Builder editions have been placed on the same version number starting with 3.3. Functionality will differ between editions, however the core objects are shared)

- Enhancements
  - The Mail Merge administration screen has been enhanced for greater usability, with field dropdown lists, a merge record count preview, and the ability to

double-click the Merge Path and Data Source fields to open the respective objects.
    - The Report/Query Administration screen now allows you to define an SQL Where statement to be used when opening a report, allowing you to list the same report in the Report/Query Viewer menu (frmReportQueryView) with unique filter criteria.
    - The Report/Query Viewer can display a record count when a Query is selected.
    - The progress bar has a new look and feel.
    - The function fChangeSubform will now open a form in a new window if frmMain is not open.

- Defect Resolutions
    - A mail merge profile that uses the email preview method was not closing the FormLetters# document.
    - Removed an error message from fFileExists (the function returns the Boolean value, which should be sufficient)
    - The popup form (frmPopup) would raise error 2450 if opened in succession too quickly.
    - A new "State Loss" message will tell users when frmMain needs to reload. This occurs when Access enters the Break Mode in VB.
    - If the Start Form is missing, an unhandled error would occur rather than displaying a popup message.
    - The Subform Administration and Role Menu forms' Action Detail dropdown boxes were not displaying available forms when a form-related Action was chosen.
    - If a user selected "Apply Settings" and frmMain is not open, an unhandled error would occur.
    - If a user changes a color scheme or the menu layout when frmMain is not open, UI Builder will no longer open frmMain or raise an error.
    - The function fCheckLinks raised an error if the back end database was not found (it should just prompt the user to re-link the tables instead of raising an error dialog).
    - Added popup error messaging to frmReportQueryAdmin and frmReportQueryView when a report or query is not found.

**Version 3.4**

- Enhancements
    - New Universal Search box allows you to add open text search without any coding.

**Version 3.5**

- Enhancements
    - New Form Directory feature allows you to display an unlimited number of forms in a directory form to users (similar to the Report/Query menu). Each form can be configured to open a specific way (dialog, filtered). The Enterprise Edition enables you to limit visibility for a specific for to a designated role.
    - A new menu layout where the main menu buttons expand or collapse to display submenu buttons below them.
    - Updated layout selection form.
    - The main form is now referenced as the object gobjMain. This means rather than deleting the form "frmMain" and replacing with a copy of the desired layout (e.g., "frmMain_leftlg"), UI Builder directly opens the form that corresponds to the chosen layout. This allows you to let users change the menu layout even when your database is compiled as an MDE/ACCDE file.
    - Hidden objects are automatically displayed when migrating your existing database into UI Builder.
    - The function to count records in a table (fTableRecordCount) has been enhanced to provide 10-20% better performance on local tables.

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- New setup wizard simplifies the startup process for new UI Builder databases.
- The main form area now expands vertically as users resize their Access window to give even more vertical screen real estate to your forms.
- Large format layouts now have wider submenu buttons.
- The merge profile administration screen now allows you to send test email messages.
- The audit functionality now uses the "Me" form object reference instead of the more complicated form name/subform object name reference, allowing you to audit forms regardless of where they are located (open by themselves, or as deeply-nested subforms).

- Defect Resolutions
  - The mail merge profile data source dropdown was corrected to include linked tables.

**Version 4.0**

- Enhancements
  - Support for Access 2010 (32-bit).
  - New Backup feature.
  - New splash screen to match Office 2010.

**Version 4.1**

- Enhancements
  - New right-hand Action Pane.
  - You can now change the menu font family and font sizes in the Color Scheme editor.
  - Mail Merge now supports Carbon Copy (cc) recipients and attachments when using the VB function fMerge().
  - New Mail Merge editor screens to simplify managing mail merge profiles.

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